Overview

Table of Contents

Preface

The *Electronic Data Exchange (EDE) Technical Reference* is designed to meet the reference needs of programmers and data processing staff.

The Department of Education (ED) provides two types of software to EDE participants: EDExpress for Windows and EDconnect.

EDExpress for Windows software is used for processing student financial aid. By using EDExpress, Financial Aid Administrators (FAAs) can import Institutional Student Information Record (ISIR) data, track documents, create student aid packages, originate loans, and track disbursements for Pell and Direct Loans.

In past versions of EDExpress, users exchanged the Free Application for Federal Student Aid (FAFSA) and ISIR correction data with the Central Processing System (CPS) by entering the data in EDExpress and then exporting that data in "batches" for transmission via the Student Aid Internet Gateway (SAIG). For 2004-2005, we are redesigning this process so schools can take advantage of instantaneous (real-time) CPS processing through the Web.

To achieve this goal, FAFSA and ISIR correction entry functionality in the 2004-2005 release of EDExpress will be accomplished via an interface with the FAA Access to CPS Online, utilizing embedded browser technology within the software. You can no longer export or transmit FAFSA or ISIR correction data to the CPS using the EDExpress software. The data will be submitted via the Web interface, and processed results will be returned to your SAIG mailbox.

The Destination Point Administrator (DPA) of the TG number currently used to send and receive FAFSA and ISIR correction data has access to the FAA Access to CPS Online Web site by default. To take advantage of the enhanced Application Processing capabilities in 2004-2005 EDExpress, the DPA will need to enroll FAA staff members who are normally responsible for FAFSA and ISIR correction data entry tasks for the FAA Access to CPS Online Web site's services prior to January 2004.

To enroll for access to the FAA Access to CPS Online Web site, go to the SAIG Enrollment Web site at **FSAWebenroll.ed.gov**.

You can still incorporate FAFSA and ISIR correction functionality into your system. This technical reference provides sufficient information for you to build your own software to complement or replace EDExpress and some Web site functionality provided by ED for sending and receiving FAFSA data. It includes information about record layouts, required edits, print assistance, and reject messages that are applicable for electronic FAFSAs, ISIRs, electronic corrections, and signature records. The record layouts are in the Record Layouts section of this technical reference.

The EDE process is described in this section with additional information in the EDE Processing section.

Note: The processing steps for your own software will remain essentially the same as the EDExpress processing steps.

Electronic FAFSA

An Electronic FAFSA sent by a school begins with a signed FAFSA completed by the student. The data can be entered by the school using the FAA Access to CPS Online Web site or transmitted to the CPS in a formatted ASCII file format. Processed FAFSA records are transmitted back to the school's destination point as ISIRs in the IDAP05OP message class.

The Record Layouts section includes information on record layouts including the FAFSA Application Export Record Layout (EAPS05IN). Reject codes are found in the Processing Codes section. How to handle rejected FAFSAs is located later in this section and in the EDE Processing section. The Printing section includes details on printing ISIRs.

Renewal FAFSA Process

Each year the CPS creates a Renewal FAFSA for each student who is eligible to participate in the Renewal Application process. The Renewal FAFSA is a tremendous time-saver for students because it carries forward most of the data provided on the prior year's FAFSA. Students only update information that has changed and complete certain income and asset questions.

For the 2004-2005 Renewal Application process, the CPS will automatically send PIN Mailers instead of paper Renewal FAFSAs to eligible applicants whose grade level in college equals fifth-year undergraduate, graduate/professional, or beyond. The CPS also will send PIN Mailers to students who used the Internet to submit a 2003-2004 FAFSA or to make corrections to their FAFSA data. Students who supplied an e-mail address with correct syntax on their applications will receive a PIN Reminder by e-mail.

More details about student eligibility to participate in the Renewal Application process are provided in the *Renewal Application Data (RAD) Process Guide* which can be found on ED's Federal Student Aid Download (FSAdownload) Web site located at **FSAdownload.ed.gov** as well as on Information for Financial Aid Professionals (IFAP) Web site, located at **ifap.ed.gov**.

Your school can also request that specific students or groups of students receive PIN Mailers instead of paper Renewal FAFSAs. If an e-mail address is present for the student, we will attempt to send an e-mail instead of a paper PIN Mailer. You can request that the CPS send PIN Mailers to your students by submitting either a PIN Request through FAA Access to CPS Online or a Type 2 Request through the SAIG. Instructions for making PIN requests are in the "PIN Requests" section of this guide.

School Eligibility to Make PIN Requests

To participate in the PIN Request process through the FAA Access to CPS Online site or the Type 2 Requests through the SAIG, your school must:

- Have completed and filed an SAIG Enrollment Form that requests specific services for an EDE process (such as receiving electronic daily ISIRs). The SAIG Enrollment process can be completed at **FSAwebenroll.ed.gov**;

- Have an active enrollment status for your Federal School Code, which means you have correctly indicated on your SAIG Enrollment Form the Federal School Code you plan to use to perform the specific processes;

- Ensure your Federal School Code has an active enrollment status for PIN Requests. Your enrollment status is designated on your school's SAIG Enrollment Form with CPS/WAN Technical Support; *and*

- Be set up to receive electronic daily ISIRs for the 2003-2004 or 2004-2005 academic years for the destination number (TG#) you use to submit your PIN Requests.

If your school is not enrolled to receive daily ISIRs, you cannot make PIN Requests. To verify or update your status for electronic daily ISIRs or PIN Requests, contact CPS/WAN Technical Support at 800/330-5947.

What's New for the Renewal FAFSA Process for 2004-2005

- We will send a PIN Reminder through e-mail to students who have PINs and who provided e-mail addresses with correct syntax on their 2003-2004 FAFSA records. The e-mail will no longer include a URL for students to retrieve their PINs on the Internet.

- We have decreased the length of the RADD05IN record (Type 2 PIN Requests) from 109 bytes to 85 bytes. This change reflects a decrease in the number of bytes of the filler at the end of the record. The only valid content changes on the RADD05IN are for Year Indicator position 8 and Format Error Code position 81. See the record layout for these changes.

- We are eliminating batch processing for 2004-2005, so CPS Header and Trailer records are not required for the Type 2 PIN Requests.

- We will not require a deliverable address within the U.S. as a Renewal Application eligibility requirement, since we will communicate with some students through e-mail. However, we do require a non-foreign, deliverable address for mailing the paper Renewal FAFSA to those students who do not qualify for a PIN Mailer.

- The PIN Mailer will contain a tear-out wallet card containing the student's PIN.

- We will carry forward the following match results from the student's 2003-2004 Renewal FAFSA eligible transaction to the 2004-2005 Renewal FAFSA, provided that the student did not make changes to his or her Social Security Number (SSN), name, or date of birth (DOB) on the 2004-2005 Renewal FAFSA, and:

  - Selective Service Match = Y (confirmed)

  - Veterans Administration (VA) Match = 1 (confirmed)

- SSN Match = 4 and Social Security Administration (SSA) Citizenship status = A or Blank (Citizen) or SSA Citizenship status = B, C, D, E, or F (not a Citizen) and Student's Reported Citizenship = 2 (eligible non-Citizen).

On the Renewal FAFSA, we will no longer preprint values for tax return fields, income fields, and the cash, checking, and savings fields for students with an automatic zero Expected Family Contribution (EFC).

- We will carry forward all schools reported on the student's 2003-2004 application record instead of listing only the schools that made payments to the student as reported on the National Student Loan Data System (NSLDS).

- We will print the student's current SSN in the barcode area of the paper Renewal FAFSA and the student's last name on the second page of the Renewal FAFSA in the Step Two heading.

- The RAPP PIN/Print Notification file notifies schools whether students who were eligible to participate in the Renewal Application process received a paper Renewal FAFSA or a PIN Mailer/e-mail. In 2004-2005, schools can also use this file to determine if a Renewal-eligible student received neither a paper Renewal FAFSA nor PIN Mailer/e-mail. This change is discussed in detail in the "How do I determine if a student received a paper Renewal FAFSA, a PIN Mailer, or a PIN Reminder through e-mail?" section of the *RAD Process Guide*.

Refer to the *RAD Process Guide* for more details regarding the PIN request and the RAD process. The *RAD Process Guide* can be found on ED's Federal Student Aid Download (FSAdownload) Web site located at **FSAdownload.ed.gov** as well as Information for Financial Aid Professionals (IFAP) Web site, located at **ifap.ed.gov**.

Institutional Student Information Record (ISIR)

CPS generates an ISIR in response to:

- FAFSAs or correction records from your school.

- Electronic FAFSAs and corrections completed by another school. You will receive the resulting ISIR if your Federal School Code is listed on the transaction.

- Web FAFSAs or corrections using FAFSA on the Web, Renewal FAFSA on the Web, or Corrections on the Web.

- Paper FAFSAs or corrections to a Student Aid Report (SAR) if your Federal School Code is listed on the transaction.

- A Secondary post-screening transaction from NSLDS or Department of Homeland Security (DHS).

- An application or correction submitted via FAA Access to CPS Online.

- System-generated ISIRs.

CPS sends ISIRs to destination points for every student indicating a school serviced by the destination point on the FAFSA, and to state agencies that elect to receive ISIRs for legal residents or students indicating a school in that state. The Record Layouts section includes details on the ISIR Record layouts. The Processing Codes section includes information on comment codes and verifiable rejects and how to respond to them.

The Printing section contains specifications for printing the ISIR.

Electronic Corrections

Schools can submit corrections to the FAFSA data electronically. The Correction Record Layout is found in the Record Layouts section and is submitted in the CORR05IN message class.

Information about adding your Federal School Code to receive electronic data, making signature corrections, and using the Correction Record Layout are found in section 2, EDE Processing.

Handling Record Level Rejected Records

If the specifications in this technical reference are not followed on a particular record, an EDE Record Level Error Report file is transmitted to you and may be printed as an error report. (The layout is in the Record Layouts section.)

The EDE Record Level Error Report Import Record Layout contains the student's SSN, the student's name ID, transaction number, last name, first name, the SAR field number in error, an edit code, an error code, and a text explanation for the reason the record was rejected. Each field in error is reported. If it was rejected due to an invalid value, CPS sends the actual value of the data received from the school. The student's SSN is listed more than once in the EDE Record Level Error Import Report when a record has more than one field in error. See section 4, Processing Codes for additional details about rejects. The following is a list of message classes for reporting errors:

        CORE05OP   Electronic Correction Errors

        EAPR05OP   Electronic Application Rejects

        EREP05OP   PIN Request Errors

        SIGA05OP   Signature Correction Errors

What's New and Changed in the EDE Technical Reference for 2004-2005

Listed below are some of the significant changes in the *2004-2005 EDE Technical Reference*.

- You will no longer be able to request duplicate ISIRs electronically. However, you can still request them through the Federal Student Aid Information Center. Duplicate requests will be processed as SAR reprints through the ISIR Datamart. For more information on the ISIR Datamart refer to the *School Electronic Process Guide*. This process guide can be found on ED's Federal Student Aid Download (FSAdownload) Web site located at **FSAdownload.ed.gov** as well as Information for Financial Aid Professionals Web (IFAP) site, located at **ifap.ed.gov**.

- Federal Data Requests and Year-to-Date ISIR Request processes are eliminated and functionality replaced with the ISIR Datamart.

- Because batch processing has been eliminated, all batch reject errors and edits will be deleted.

Section 3 Changes

- The FAFSA Express/Web Hold Information Record Layout was renamed the School Web Student Signature Hold Information Record Layout.

- We removed "Mailer" from the title of the Type 2 Individual PIN Mailer Request Export and PIN Error Import Record Layout.

ISIR Changes

Please refer to section 4, Processing Codes, for the 2004-2005 ISIR Cross Reference table. This table is a cumulative list of changes to the ISIR.

The following fields were added to the ISIR Record Layout:

- Father's/Stepfather's First Name Initial

- Father's/Stepfather's Date of Birth

- Mother's/Stepmother's First Name Initial

- Mother's/Stepmother's Date of Birth

- Reject Override G

- Parent's E-mail Address

- Address Only Change Flag

- CPS Pushed ISIR Flag

- SAR C Change Flag

- Father's/Stepfather's SSN Match Flag

- Mother's/Stepmother's SSN Match Flag

- Electronic Transaction Indicator (ETI) Flag

- Subsidized Loan Limit Flag

- Combined Loan Limit Flag

The following field was changed:

- Summer 2003 renamed as Enrollment Status (we combined all enrollment status fields into one)

The following fields were deleted from the ISIR Record Layout:

- Fall 2003?

- Winter 2003-2004?

- Spring 2004?

- Summer 2004?

- Age of Older Parent

- Input Record Type

- Serial Number

- Early Analysis Flag

- Electronic Application Entry Source Code

- Duplicate Request Indicator

- SSA Date of Death

- Subsequent Application Flag

- Paid EFC

- Paid EFC Type

- Duplicate Date

- ISIR Transaction Type

Section 4 Changes

Table of Reject Codes and how to Respond to Each

Modified Rejects:

- Rejects D and E were changed from rejects to warning edits.

New Rejects:

- G - Taxes paid is greater than zero, and greater than or equal to a fixed percentage of the AGI, but not equal to or greater than AGI. (Dependent Student)

- S - Father's Social Security match but no date of birth match

- T - Mother's Social Security match but no date of birth match

- 6 - Father's Social Security Number was not matched with the Social Security Administration

- 7 - Mother's Social Security Number was not matched with the Social Security Administration

- 12 - Dependent student, taxes paid amount is greater than or equal to AGI

Record and Transmission Error Messages

- Renamed the table

- Deleted former batch reject reasons 1 to 9

- Added new Transmission Error Codes 17 and 18

- Added new Reject Error Codes 14, 15, and 16

- Modified error messages for Reject Error Codes 01, 04, 05, 06, 08, 10, and 13

Message Classes

We are making changes to the 2004-2005 message classes in order to implement the new ISIR Datamart on January 1, 2004. The message class changes will affect 2004-2005 ISIRs and beyond, but will not affect the message class system for 2003-2004 ISIRs.

When implemented, the new ISIR Datamart will store all 2004-2005 ISIR transaction data generated by the CPS for distribution and retrieval by schools, state agencies, and other authorized users. Users of ISIR data will have the option to continue to receive ISIRs as they currently do, or they can elect to go to FAA Access to CPS Online and request ISIRs from the Datamart based on query criteria. Users who elect to continue to receive daily ISIRs also have the option to request ISIRs from the Datamart if they wish.

In addition to daily and requested ISIRs, some ISIRs will be distributed (or "pushed") to schools whether they were requested or not. If your school code is listed on a transaction, you will receive an ISIR for the student under a separate message class. These separate message classes will include:

- Transactions where the EFC has changed from the previous transaction.

- Transactions where the SAR C Flag has changed between transactions.

- System-generated transactions including NSLDS postscreening, DHS Secondary Confirmation, and reprocessed ISIRs.

You will need to review all ISIRs received under a CPS Pushed ISIR message class and assess any potential impact to the students' aid eligibility.

In addition, all ISIRs must be reviewed for applicants that are enrolled at your school.

Other message class changes include:

- Changed process year in all message classes from 04 to 05

- New Message classes:

Schools

- IDAP05OP: Daily ISIRs that are the result of Application records submitted by the school

- IDCO05OP: Daily ISIRs that are the result of Correction records submitted by the school

- IDSA05OP: Daily ISIRs that are generated for all schools listed on the record

- IGCO05OP: CPS Pushed ISIRs that are the result of Correction records submitted by the school

- IGSA05OP: CPS Pushed ISIRs that are generated for all schools listed on the record

- ISRF05OP: ISIRs requested directly from the ISIR Datamart

State Agencies

- IDRE05OP: Daily ISIRs for State Agency Residents

- IDNR05OP: Daily ISIRs for State Agency Non Residents

- IGRE05OP: CPS Pushed ISIRs for State Agency Residents

- IGNR05OP: CPS Pushed ISIRs for State Agency Non-Residents

Test ISIR files

- TDAP05OP: Daily Application ISIRs

- TDCO05OP: Daily Correction ISIRs

- TDSA05OP: Daily Automatic ISIRs

- TGCO05OP: CPS Pushed Correction ISIRs

- TGSA05OP: CPS Pushed Automatic ISIRs

- Deleted Message classes

  - CORR04OP: Electronic Correction/Duplicate ISIR

  - EAPS04OP: Electronic Application ISIRs

  - ESFN04OP: State Agency ISIR Non-Resident

  - ESFR04OP: State Agency ISIR Resident

  - FDRE04OP: Rejected FDR Request

  - FDRF04OP: Processed FDRs

  - FDRS04IN: FDR Request

  - FDRU04OP: Unfulfilled FDRs After 30 Days

  - SARA04OP: Automatic ISIRs

  - SYSG04OP: System-generated ISIRs

  - TAPS04OP: Test System – Application ISIRs

  - TCOR04OP: Test System – Correction ISIRs

  - TSAR04OP: Test System – Automatic ISIRs

  - YTDN04OP: State Agency YTD ISIR Non-Resident

  - YTDO04OP: Year-to-Date ISIRs

  - YTDR04OP: State Agency YTD ISIR Resident

- Increased record length for ISIR files from 2560 bytes to 2600 bytes

- Decreased the length of the RADD05IN from 109 bytes to 85 bytes. The file length change is due to elimination of some of the final filler positions. The filler was used to make the length of the RADD05IN file the same length of the Header and Trailer records which we no longer use.

What's Changed in the Record Layouts Section since the Initial Draft Version (July 2003)

ISIR Record Description/Data Description

- Added Blank as valid content for Student's E-mail Address (field 16), positions 142 to 191 and Parent's E-mail Address (field 127), positions 570 to 619.

- Added new values to Transaction Data Source/Type Code (field 111), positions 535 to 536 and Application Data Source/Type Code (field 133) positions 659 to 660.

  3E = EZ FAFSA
  3G = EZ FAFSA Renewal Application
  3H = EZ FAFSA Correction (not added to Application Data Source)

- Modified description of Reject Override C (field 122).

- Added Reject Override G (field 123). The field numbers, start positions, and end positions changed for field numbers 123 to 151 and positions 561 to 708. The filler in the old field number 151 was deleted.

- Added SAR number 107 to FAA Adjustment (field 132).

- Added the ETI Flag (field 270). The field numbers after the ETI Flag have incremented by one. The start positions and end positions from the ETI Flag to the first Filler field after the ETI Flag have increased by one byte. The Filler end position remains the same.

- Modified description for Multi School Code Flags. This field will now hold the ETI flag for each of the six schools.

FAFSA Application Record Export Layout

- Modified description of Reject Override C (field 118).

- Added Reject Override G (field 119). The field numbers, start positions, and end positions changed for field numbers 119 to the end of the record, positions 558 to 561.

- Increased the Total Bytes of the record layout from 798 to 800.

Correction Record Export Layout

- Modified description of Reject Override C (field 40).

- Added Reject Override G (field 41). The field numbers, start positions, and end positions changed for field numbers 41 to the end of the record, positions 540 to 549.

Type 2 Individual PIN Request Export and PIN Error Import Record Layout

- Changed field name PIN Indicator to PIN Mailer Indicator (field 18), position 80.

RAPP PIN/Print Notification Layout

- Changed field name PIN Indicator to PIN Mailer Indicator (field 13), position 167.

What's Changed in the Record Layouts Section since the September 2003 Version

EDE Record Level Error Report Import Record

- Added Federal School Code (field 6), positions 42 to 47. The length of this record increased six bytes from 109 bytes to 115 bytes. The field numbers, start positions, and end positions changed for field numbers 6 to 11, positions 42 to 115.

ISIR Record Description/Data Description

- Changed the field name for field 286 from NSLDS Loan Satisfactory Repayment Flag to NSLDS Loan Satisfactory Payment Arrangement Flag

- Changed the field name for field 303 from NSLDS Satisfactory Repayment Change Flag to NSLDS Satisfactory Payment Arrangement Change Flag

- Changed the valid value description of S = Satisfactory Repayment to S = Satisfactory Payment Arrangements for the following fields.

    - NSLDS Pell Overpayment Flag (field 278)

    - NSLDS SEOG Overpayment Flag (field 280)

    - NSLDS Perkins Overpayment (field 282)

 FAFSA Application Export Record Layout

- Modified the length of field 106, Filler, from 10 bytes to eight bytes and removed the text from the Changes column. The field positions did not change.

RAPP PIN/Print Notification Layout

- Added Federal School Code (field 16), position 176 to 181. The Filler field is now field 17 and is four bytes long.

Getting Help

For a complete listing of all FSA sources of assistance go to the FSAdownload Web site located at **FSAdownload.ed.gov** to download the *Sources of Assistance for Schools* guide.

CPS/WAN Technical Support

If you have questions or concerns regarding this technical reference please contact CPS/WAN Technical Support. Working hours are 7 a.m. – 7 p.m. (CT), Monday through Friday.

Toll-free: 800/330-5947

Telecommunications Device for the Deaf (TDD/TTY): 800/511-5806

Fax: 319/665-7662

E-mail: cpswan@ncs.com

FSATECH

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ed.gov/offices/FSA/services/fsatechsubscribe.html